

Get

CONNECTED



A Deep Dive into QBOA featuring QBTax

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Take a few moments
to **Connect** with
your neighbour

Today's Speakers



Tiffany J Stewart, CPA, CMA
Owner, Tiffany J. Stewart CPA
President, Marabirch Inc.
Administrator, QB-HQ



Dawne Leaney Davidson
Owner, Freelif Accounting +
Bookkeeping
Vice-President, Marabirch Inc.
Administrator, QB-HQ

Agenda

QBOA Dashboard

- Clients
- Team
- ProAdvisor
- Work
- Apps

Workpapers

Accountant Tools

QBTax

Clients Demo

KEY TAKEAWAY: Enhanced notes
and shared documents.

QBOA Dashboard

Team

qb Accountant

YOUR PRACTICE

Clients

Team

ProAdvisor

Work

Apps

User Profile

Firm Administration and Books

Client Access

Access: Basic

YOUR FIRM ADMINISTRATION	ACCESS
Firm information	View only
Firm users	None
Subscriptions and billing	None

YOUR FIRM BOOKS	ACCESS
Customers and accounts receivable	No
Suppliers and accounts payable	No

YOUR CLIENTS	ACCESS
Manage your clients	No

Access to firm administration and books

Full

- Full access to administrative functions for your firm
- Full access to managing clients
- Full access to your firm's books
- Administrator access to client QuickBooks

Basic

- Limited access to administrative functions for your firm
- No access to managing clients
- No access to your firm's books
- Administrator access to client QuickBooks

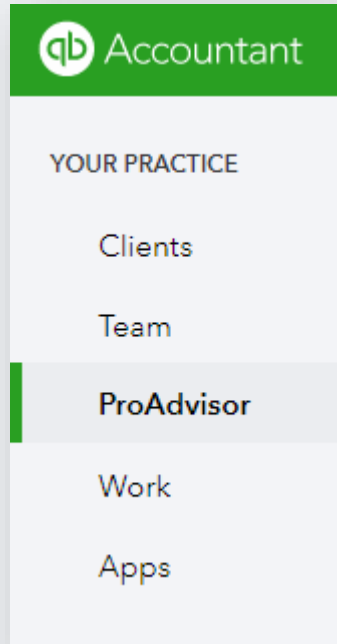
Custom

- Custom access to administrative functions for your firm
- Custom access to managing clients
- Custom access to your firm's books
- Administrator access to client QuickBooks

KEY TAKEAWAY: Easy to add team members, their access levels, and which clients they can access.

QBOA Dashboard

ProAdvisor



Valuable information

- ProAdvisor status, company name and certifications
- Your Intuit Consultant and how to contact him/her

New ProAdvisor tiers

- Bronze – 0-2 QBO clients
- Silver – 3-9 QBO clients or QBO Core Certified
- Gold – 11-24 or QBO Advanced Certified
- Platinum – 25+ and QBO Core Certified

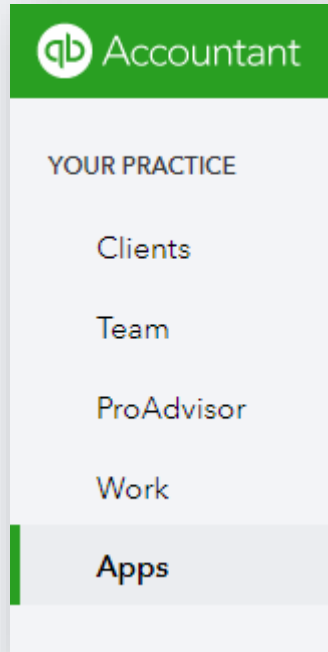
KEY TAKEAWAY: Certification badges available for download

Work Demo

KEY TAKEAWAY: Excellent introductory practice management option and client document sharing.

QBOA Dashboard

Apps



Single management location

- Find apps
- Connect apps to clients
- See and manage Firm apps

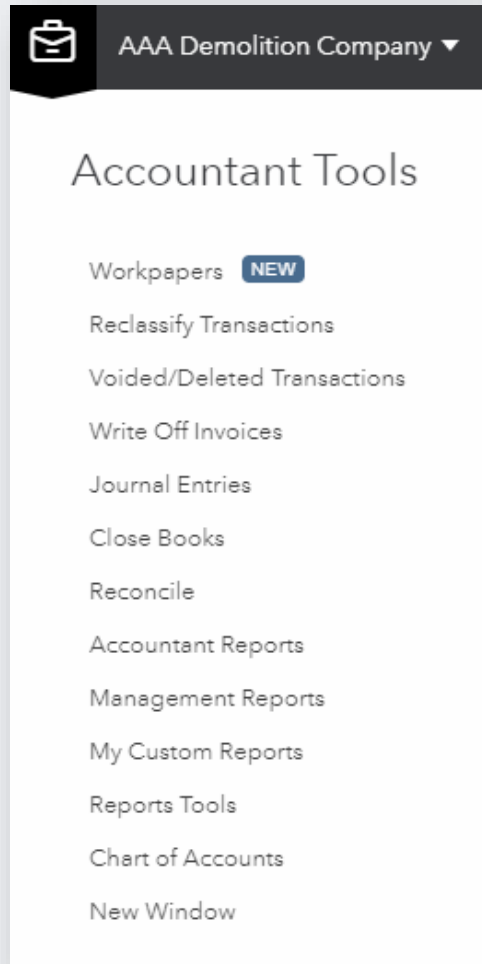
KEY TAKEAWAY: Apps enhance the QBO experience for ProAdvisors and clients

Workpapers Demo

KEY TAKEAWAY: Corporation books to tax in one platform.

Accountant Tools

Single dropdown with tools/shortcuts at your fingertips



Tools

- Workpapers
- Reclassify Transactions
- Journal Entries
- Reconcile
- Reports Tools

Shortcuts

- Voided/Deleted Transactions
- Close Books
- Accountant Reports
- Management Reports
- My Custom Reports
- Chart of Accounts
- New Window

BEST PRACTICE: Do not use Write Off Invoices – you cannot recapture GST/HST on bad debt with this tool.

KEY TAKEAWAY: Use Report Tools to change report default dates, Cash or Accrual report default, Close Books, and see Reconciliation Status.

QBTax Demo

KEY TAKEAWAY: Books and tax returns all in one place.

Questions?

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